



Euromonitor
International

Apparel and Footwear in Canada

November 2024

Table of Contents

EXECUTIVE SUMMARY

Apparel and footwear in 2024: The big picture
2024 key trends
Competitive landscape
Retailing developments
What next for apparel and footwear?

MARKET DATA

- Table 1 - Sales of Apparel and Footwear by Category: Volume 2019-2024
- Table 2 - Sales of Apparel and Footwear by Category: Value 2019-2024
- Table 3 - Sales of Apparel and Footwear by Category: % Volume Growth 2019-2024
- Table 4 - Sales of Apparel and Footwear by Category: % Value Growth 2019-2024
- Table 5 - NBO Company Shares of Apparel and Footwear: % Value 2020-2024
- Table 6 - LBN Brand Shares of Apparel and Footwear: % Value 2021-2024
- Table 7 - Distribution of Apparel and Footwear by Format: % Value 2019-2024
- Table 8 - Distribution of Apparel and Footwear by Format and Category: % Value 2024
- Table 9 - Forecast Sales of Apparel and Footwear by Category: Volume 2024-2029
- Table 10 - Forecast Sales of Apparel and Footwear by Category: Value 2024-2029
- Table 11 - Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2024-2029
- Table 12 - Forecast Sales of Apparel and Footwear by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

Inflation shapes spending habits in childrenswear
Growth in second-hand childrenswear
New brand launches despite economic challenges

PROSPECTS AND OPPORTUNITIES

Sustainability and circular economy gain momentum
E-commerce drives price competition and consumer choice
Inclusive and sustainable childrenswear on the rise

CATEGORY DATA

- Table 13 - Sales of Childrenswear by Category: Volume 2019-2024
- Table 14 - Sales of Childrenswear by Category: Value 2019-2024
- Table 15 - Sales of Childrenswear by Category: % Volume Growth 2019-2024
- Table 16 - Sales of Childrenswear by Category: % Value Growth 2019-2024
- Table 17 - NBO Company Shares of Childrenswear: % Value 2020-2024
- Table 18 - LBN Brand Shares of Childrenswear: % Value 2021-2024
- Table 19 - Forecast Sales of Childrenswear by Category: Volume 2024-2029
- Table 20 - Forecast Sales of Childrenswear by Category: Value 2024-2029
- Table 21 - Forecast Sales of Childrenswear by Category: % Volume Growth 2024-2029
- Table 22 - Forecast Sales of Childrenswear by Category: % Value Growth 2024-2029

Apparel Accessories in Canada

KEY DATA FINDINGS

2024 DEVELOPMENTS

Masks decline as public awareness of COVID fades

Marginal growth for key accessories

DEI and sustainability drive product innovation

PROSPECTS AND OPPORTUNITIES

Mask demand expected to wane further

Price sensitivity shapes apparel accessories

E-commerce continues to transform apparel accessories

CATEGORY DATA

Table 23 - Sales of Apparel Accessories by Category: Volume 2019-2024

Table 24 - Sales of Apparel Accessories by Category: Value 2019-2024

Table 25 - Sales of Apparel Accessories by Category: % Volume Growth 2019-2024

Table 26 - Sales of Apparel Accessories by Category: % Value Growth 2019-2024

Table 27 - NBO Company Shares of Apparel Accessories: % Value 2020-2024

Table 28 - LBN Brand Shares of Apparel Accessories: % Value 2021-2024

Table 29 - Forecast Sales of Apparel Accessories by Category: Volume 2024-2029

Table 30 - Forecast Sales of Apparel Accessories by Category: Value 2024-2029

Table 31 - Forecast Sales of Apparel Accessories by Category: % Volume Growth 2024-2029

Table 32 - Forecast Sales of Apparel Accessories by Category: % Value Growth 2024-2029

Menswear in Canada

KEY DATA FINDINGS

2024 DEVELOPMENTS

Evolving casualisation and the push for value

Luxury menswear thrives amid economic disparities

International brands enhance diversity

PROSPECTS AND OPPORTUNITIES

Balancing value and casualisation amid economic pressures

Luxury expansion bolstered by new retail spaces

Brand collaborations to drive modernity and inclusivity

CATEGORY DATA

Table 33 - Sales of Menswear by Category: Volume 2019-2024

Table 34 - Sales of Menswear by Category: Value 2019-2024

Table 35 - Sales of Menswear by Category: % Volume Growth 2019-2024

Table 36 - Sales of Menswear by Category: % Value Growth 2019-2024

Table 37 - NBO Company Shares of Menswear: % Value 2020-2024

Table 38 - LBN Brand Shares of Menswear: % Value 2021-2024

Table 39 - NBO Company Shares of Men's Nightwear: % Value 2020-2024

Table 40 - LBN Brand Shares of Men's Nightwear: % Value 2021-2024

Table 41 - NBO Company Shares of Men's Outerwear: % Value 2020-2024

Table 42 - LBN Brand Shares of Men's Outerwear: % Value 2021-2024

Table 43 - NBO Company Shares of Men's Swimwear: % Value 2020-2024

Table 44 - LBN Brand Shares of Men's Swimwear: % Value 2021-2024

Table 45 - NBO Company Shares of Men's Underwear: % Value 2020-2024

Table 46 - LBN Brand Shares of Men's Underwear: % Value 2021-2024

Table 47 - Forecast Sales of Menswear by Category: Volume 2024-2029

Table 48 - Forecast Sales of Menswear by Category: Value 2024-2029

Table 49 - Forecast Sales of Menswear by Category: % Volume Growth 2024-2029

Table 50 - Forecast Sales of Menswear by Category: % Value Growth 2024-2029

Womenswear in Canada

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Resilience amidst economic challenges and casualisation trends
- Functional and inclusive women's underwear gains traction
- International expansion bolsters competition

PROSPECTS AND OPPORTUNITIES

- Sustained growth through casualisation and value focus
- Swimwear benefits from tourism and brand innovation
- Luxury womenswear expands with major mall openings

CATEGORY DATA

Table 51 - Sales of Womenswear by Category: Volume 2019-2024

Table 52 - Sales of Womenswear by Category: Value 2019-2024

Table 53 - Sales of Womenswear by Category: % Volume Growth 2019-2024

Table 54 - Sales of Womenswear by Category: % Value Growth 2019-2024

Table 55 - NBO Company Shares of Womenswear: % Value 2020-2024

Table 56 - LBN Brand Shares of Womenswear: % Value 2021-2024

Table 57 - NBO Company Shares of Women's Nightwear: % Value 2020-2024

Table 58 - LBN Brand Shares of Women's Nightwear: % Value 2021-2024

Table 59 - NBO Company Shares of Women's Outerwear: % Value 2020-2024

Table 60 - LBN Brand Shares of Women's Outerwear: % Value 2021-2024

Table 61 - NBO Company Shares of Women's Swimwear: % Value 2020-2024

Table 62 - LBN Brand Shares of Women's Swimwear: % Value 2021-2024

Table 63 - NBO Company Shares of Women's Underwear: % Value 2020-2024

Table 64 - LBN Brand Shares of Women's Underwear: % Value 2021-2024

Table 65 - Forecast Sales of Womenswear by Category: Volume 2024-2029

Table 66 - Forecast Sales of Womenswear by Category: Value 2024-2029

Table 67 - Forecast Sales of Womenswear by Category: % Volume Growth 2024-2029

Table 68 - Forecast Sales of Womenswear by Category: % Value Growth 2024-2029

Jeans in Canada

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Slower growth amid economic challenges
- Expanding style options to meet diverse tastes
- Global brands embrace denim's versatility

PROSPECTS AND OPPORTUNITIES

- Sustained demand amid rising competition
- Sustainability takes centre stage
- E-commerce strengthens its position

CATEGORY DATA

Table 69 - Sales of Jeans by Category: Volume 2019-2024

Table 70 - Sales of Jeans by Category: Value 2019-2024

Table 71 - Sales of Jeans by Category: % Volume Growth 2019-2024

Table 72 - Sales of Jeans by Category: % Value Growth 2019-2024

Table 73 - Sales of Men's Jeans by Category: Volume 2019-2024

Table 74 - Sales of Men's Jeans by Category: Value 2019-2024

Table 75 - Sales of Men's Jeans by Category: % Volume Growth 2019-2024

Table 76 - Sales of Men's Jeans by Category: % Value Growth 2019-2024

Table 77 - Sales of Women's Jeans by Category: Volume 2019-2024

Table 78 - Sales of Women's Jeans by Category: Value 2019-2024

Table 79 - Sales of Women's Jeans by Category: % Volume Growth 2019-2024

Table 80 - Sales of Women's Jeans by Category: % Value Growth 2019-2024

Table 81 - NBO Company Shares of Jeans: % Value 2020-2024

Table 82 - LBN Brand Shares of Jeans: % Value 2021-2024

Table 83 - Forecast Sales of Jeans by Category: Volume 2024-2029

Table 84 - Forecast Sales of Jeans by Category: Value 2024-2029

Table 85 - Forecast Sales of Jeans by Category: % Volume Growth 2024-2029

Table 86 - Forecast Sales of Jeans by Category: % Value Growth 2024-2029

Table 87 - Forecast Sales of Men's Jeans by Category: Volume 2024-2029

Table 88 - Forecast Sales of Men's Jeans by Category: Value 2024-2029

Table 89 - Forecast Sales of Men's Jeans by Category: % Volume Growth 2024-2029

Table 90 - Forecast Sales of Men's Jeans by Category: % Value Growth 2024-2029

Table 91 - Forecast Sales of Women's Jeans by Category: Volume 2024-2029

Table 92 - Forecast Sales of Women's Jeans by Category: Value 2024-2029

Table 93 - Forecast Sales of Women's Jeans by Category: % Volume Growth 2024-2029

Table 94 - Forecast Sales of Women's Jeans by Category: % Value Growth 2024-2029

Hosiery in Canada

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Sheer hosiery faces a competitive environment
- Non-sheer hosiery adapts to seasonal and functional needs
- Sustainability gains momentum in hosiery

PROSPECTS AND OPPORTUNITIES

- Steady growth amid changing consumer priorities
- E-commerce expands accessibility and convenience
- Direct-to-consumer brands drive innovation

CATEGORY DATA

Table 95 - Sales of Hosiery by Category: Volume 2019-2024

Table 96 - Sales of Hosiery by Category: Value 2019-2024

Table 97 - Sales of Hosiery by Category: % Volume Growth 2019-2024

Table 98 - Sales of Hosiery by Category: % Value Growth 2019-2024

Table 99 - NBO Company Shares of Hosiery: % Value 2020-2024

Table 100 - LBN Brand Shares of Hosiery: % Value 2021-2024

Table 101 - Forecast Sales of Hosiery by Category: Volume 2024-2029

Table 102 - Forecast Sales of Hosiery by Category: Value 2024-2029

Table 103 - Forecast Sales of Hosiery by Category: % Volume Growth 2024-2029

Table 104 - Forecast Sales of Hosiery by Category: % Value Growth 2024-2029

Footwear in Canada

KEY DATA FINDINGS

2024 DEVELOPMENTS

- A market adjusting to economic challenges
- Resilience in children’s footwear sales
- Competitive landscape driven by casualisation and innovation

PROSPECTS AND OPPORTUNITIES

- Steady growth amid population expansion
- Sustainability shapes consumer preferences
- The rising dominance of e-commerce

CATEGORY DATA

- Table 105 - Sales of Footwear by Category: Volume 2019-2024
- Table 106 - Sales of Footwear by Category: Value 2019-2024
- Table 107 - Sales of Footwear by Category: % Volume Growth 2019-2024
- Table 108 - Sales of Footwear by Category: % Value Growth 2019-2024
- Table 109 - NBO Company Shares of Footwear: % Value 2020-2024
- Table 110 - LBN Brand Shares of Footwear: % Value 2021-2024
- Table 111 - Distribution of Footwear by Format: % Value 2019-2024
- Table 112 - Forecast Sales of Footwear by Category: Volume 2024-2029
- Table 113 - Forecast Sales of Footwear by Category: Value 2024-2029
- Table 114 - Forecast Sales of Footwear by Category: % Volume Growth 2024-2029
- Table 115 - Forecast Sales of Footwear by Category: % Value Growth 2024-2029

Sportswear in Canada

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Slower growth as pandemic recovery levels off
- Performance apparel and footwear drive market growth
- Activewear gains fresh momentum with new entrants

PROSPECTS AND OPPORTUNITIES

- Versatile performance apparel supports everyday use
- Indigenous design initiatives gain prominence
- Expanding retail networks enhance accessibility

CATEGORY DATA

- Table 116 - Sales of Sportswear by Category: Value 2019-2024
- Table 117 - Sales of Sportswear by Category: % Value Growth 2019-2024
- Table 118 - NBO Company Shares of Sportswear: % Value 2020-2024
- Table 119 - LBN Brand Shares of Sportswear: % Value 2021-2024
- Table 120 - Distribution of Sportswear by Format: % Value 2019-2024
- Table 121 - Forecast Sales of Sportswear by Category: Value 2024-2029
- Table 122 - Forecast Sales of Sportswear by Category: % Value Growth 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/apparel-and-footwear-in-canada/report.